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CONTENT MANAGEMENT SYSTEMS: THE KEY TO OMNICHANNEL EXPERIENCES

Winterberry Group



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WHITE PAPER PURPOSE AND AUTHORS

This whitepaper's purpose is to bring clarity to a complex and rapidly evolving topic - the landscape of Content Management Systems (CMS). In the process of developing this paper, Winterberry Group surveyed more than 150 decision-makers across the US and conducted in-depth interviews with influencers in the CMS market.

The result is an evidence-based examination of the use cases, considerations, tradeoffs and value of different CMS platforms while exploring the investment, technology and strategy trends that impact the content and digital experience landscape these platforms support.

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EXECUTIVE SUMMARY

In today's rapidly evolving digital landscape, organizations face the complex challenge of delivering personalized and consistent experiences across an expanding array of touchpoints. To address this challenge effectively, businesses are increasingly evaluating and evolving toward Content Management Systems.

Content Management Systems, or CMS, serve as a key component for organizations aiming to create, manage and distribute multimedia content across an array of digital and offline touchpoints. What initially began as a means to manage content for basic web pages has undergone a remarkable transformation, evolving into versatile platforms capable of facilitating and managing diverse digital experiences and offline content.

This report embarks on an exploration of the CMS landscape, shedding light on its evolution and adaptability to meet the demands of the modern customer journey. Winterberry Group dives deep into the development and capabilities of the various types of CMS platforms, providing insights for organizations to make well-informed decisions that align with their specific business objectives.

This paper highlights the deficiencies around a legacy, monolithic CMS approach when it comes to activating and managing omnichannel content and campaigns, as well as the challenges in customization, some of which can be better addressed by the capabilities offered by headless, decoupled or hybrid CMS platforms. Within the last 12-months, 42% of organizations have opted for a hybrid solution, compared to just 4% that selected a traditional CMS. Such an uptick in adoption offers insight into the transition users are currently undertaking as they shift toward a best-in-class, composable solution.

In terms of ownership costs, data security and compliance represented the primary drivers across all CMS platforms, with 35% of organizations identifying it as the major cost. While some CMS capabilities, such as the prebuilt features of Digital Experience Platforms, can reduce the complexity of data security and compliance costs, these tools come with additional disadvantages, such as a higher cost of ownership with set-up costs and limited customization aspects.

Organizations seek CMS platforms that provide the ability to support, manage and deliver omnichannel content, to deliver AI-powered content creation and to support data-driven personalization for customer-facing systems. Increasingly with modern distributed workforces, these capabilities are being used for internal employee facing systems in addition to external customers. Additionally, organizations identified analytics and reporting (55%), the availability of AI/ML for task automation and recommendations (45%), combined with a range of out-of-the-box integrations (44%) as important considerations when evaluating CMS platforms. These capabilities are essential to support the continued growth of content in delivering differentiated high-performing brand experiences.

Ultimately the selection criteria between the different solutions chosen to address the limitations of legacy systems largely depends on the use cases being addressed, internal resources and support rather than clear demarcations between the platforms. This report highlights the journey CMS users are currently on as they break free of the constraints of monolithic, legacy CMS tools and move toward composable solutions, with many opting for hybrid to support this period of evolution.



WHAT IS A CONTENT MANAGEMENT SYSTEM?

DEFINING CONTENT MANAGEMENT SYSTEMS

A Content Management System, or CMS, is an application designed to manage the creation, storage and distribution of digital content—spanning text, images, video and other multimedia elements—across digital channels, such as websites, mobile apps and other online channels. CMS platforms enable users to take a simplified approach to creating, editing and managing digital content across their desired customer touchpoints.

We define six distinct categories of Content Management Systems



TRADITIONAL, LEGACY OR COUPLED CMS (MONOLITHIC)
A comprehensive, integrated system designed for collecting, managing, delivering and optimizing content that employs pre-existing themes and templates to create digital experiences across various channels throughout the customer journey



HEADLESS CMS
API-based platforms where content and presentation layers operate independently; this separation allows for the creation of component-based digital experiences that are compatible across various systems as content is managed and delivered via APIs, offering flexibility and adaptability



OPEN-SOURCE CMS
Free-to-use or freemium models, often employed for crafting tailored solutions using extensions and plugins; open-source CMS platforms provide access to their source code for public viewing, modification and distribution, relying on active developer communities for ongoing enhancements



DECOUPLED CMS
Solutions where content management functionalities, including centralized storage and content creation, are separated from the presentation layer, allowing support of multiple front-end interfaces and platforms



DIGITAL EXPERIENCE PLATFORM (DXP)
Integrated platform(s) that encompass a spectrum of solutions, including data, intelligence and activation capabilities; these platforms maintain a comprehensive focus on content, analytics, orchestration/ decisioning, activation and commerce use cases, with content capabilities representing just one facet of their expansive suite of offerings

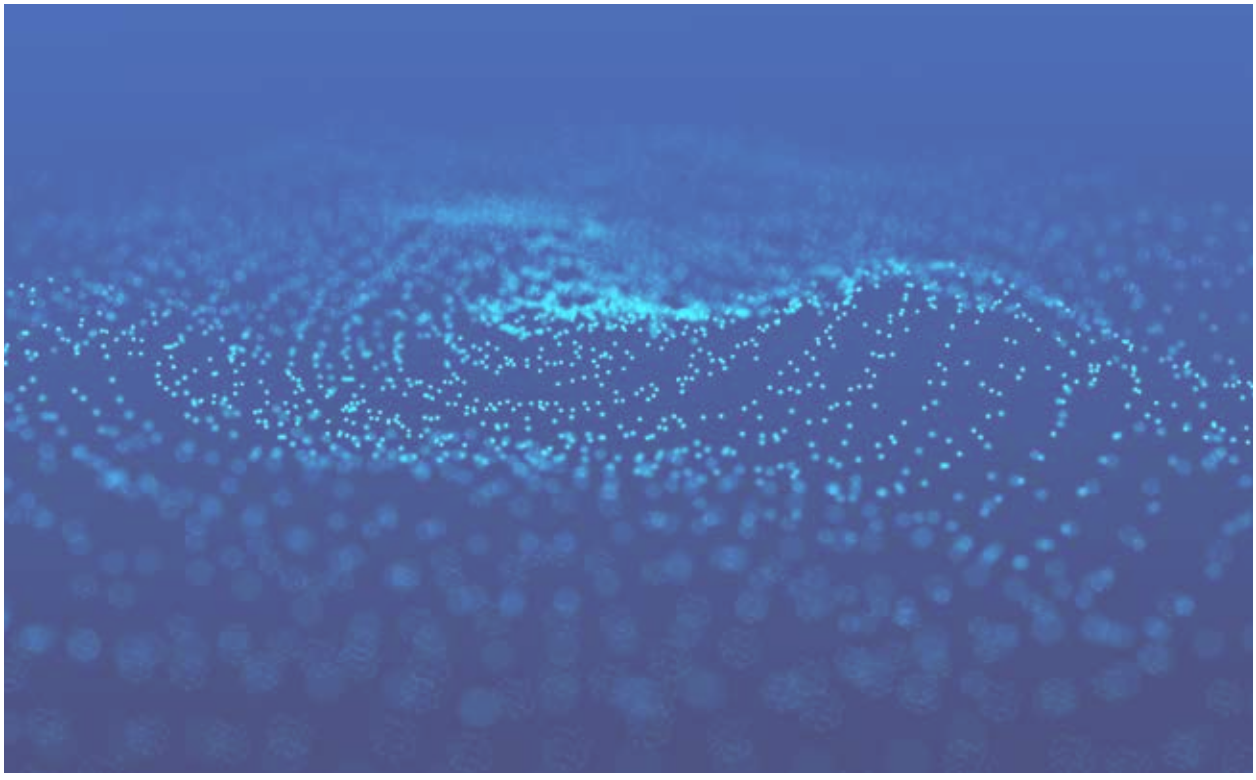


HYBRID CMS, A MIX OF TRADITIONAL AND HEADLESS OR DECOUPLED
Solutions where the back-end and front-end systems are functionally separated, while still maintaining a degree of integration; the back-end focuses on traditional CMS capabilities, such as content creation, editing, organization and management, while the front-end enables marketers/developers to focus on personalization and the customer experience; hybrid architectures leverage both traditional and headless capabilities through their structured content delivery and API-based content distribution architectures

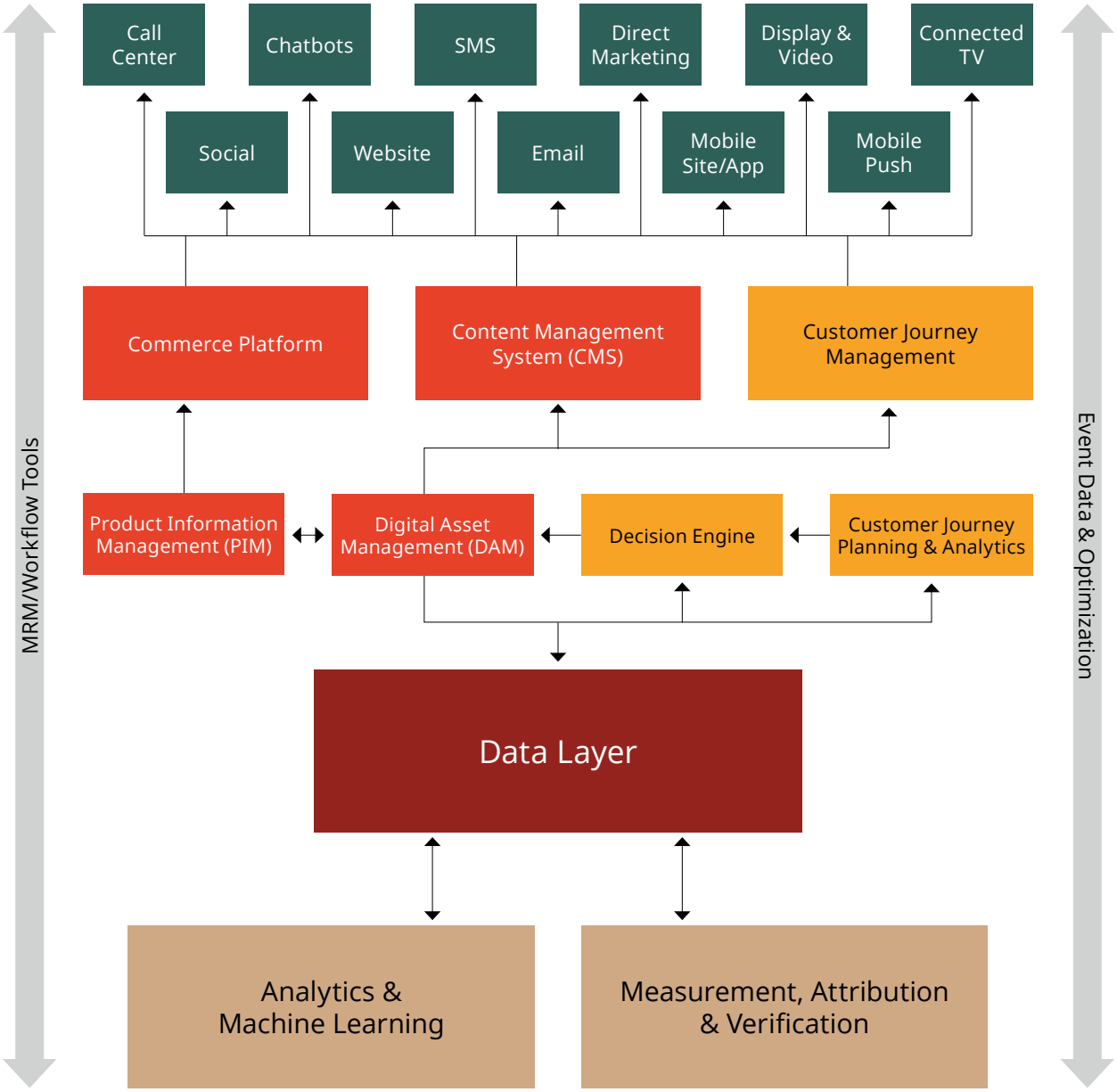
THE EVOLUTION AND DRIVERS OF CMS PLATFORMS

The journey of Content Management Systems from their early origins to their current state has been remarkable, driven by technological advancements, evolving market demands and the increasing complexity of customer journeys. The origin of CMS platforms can be traced back to the early days of website creation, but its evolution is best understood by examining the transformation of user experiences: from static web pages to the proliferation of multiple pages per site and finally to the complex, highly personalized omnichannel customer journey we observe today.

THE ORIGINS: BASIC WEBSITES WITH STATIC CONTENT	CMS platforms began with websites resembling digital brochures, featuring static text and photos. Full-stack CMS platforms, such as open-source and monolithic platforms, provided a templated content approach but required time-consuming website refreshes.
THE EVOLUTION: COMPLEX WEBSITES WITH COMMERCE OPTIMIZATION	Websites evolved to optimize content for search engines, becoming multimedia element destinations and with heightened commerce focus. Monolithic solutions remained dominant, but headless and decoupled platforms emerged for flexibility, rapid updates and distribution of content.
THE PRESENT: OMNICHANNEL PERSONALIZED EXPERIENCES	Complex content needs with content being distributed across both digital and physical touchpoints, driving omnichannel personalization. Hybrid solutions bridge structured content with flexibility. Website updates are swift, empowering non-technical users, with embedded workflows.



CONTENT MANAGEMENT SYSTEMS INTEGRATE ACROSS THE TECH STACK TO POWER BRAND EXPERIENCES



Legend:

- Channel/ Activation
- Content and Distribution System
- Decisioning and Rules System
- Data
- Process

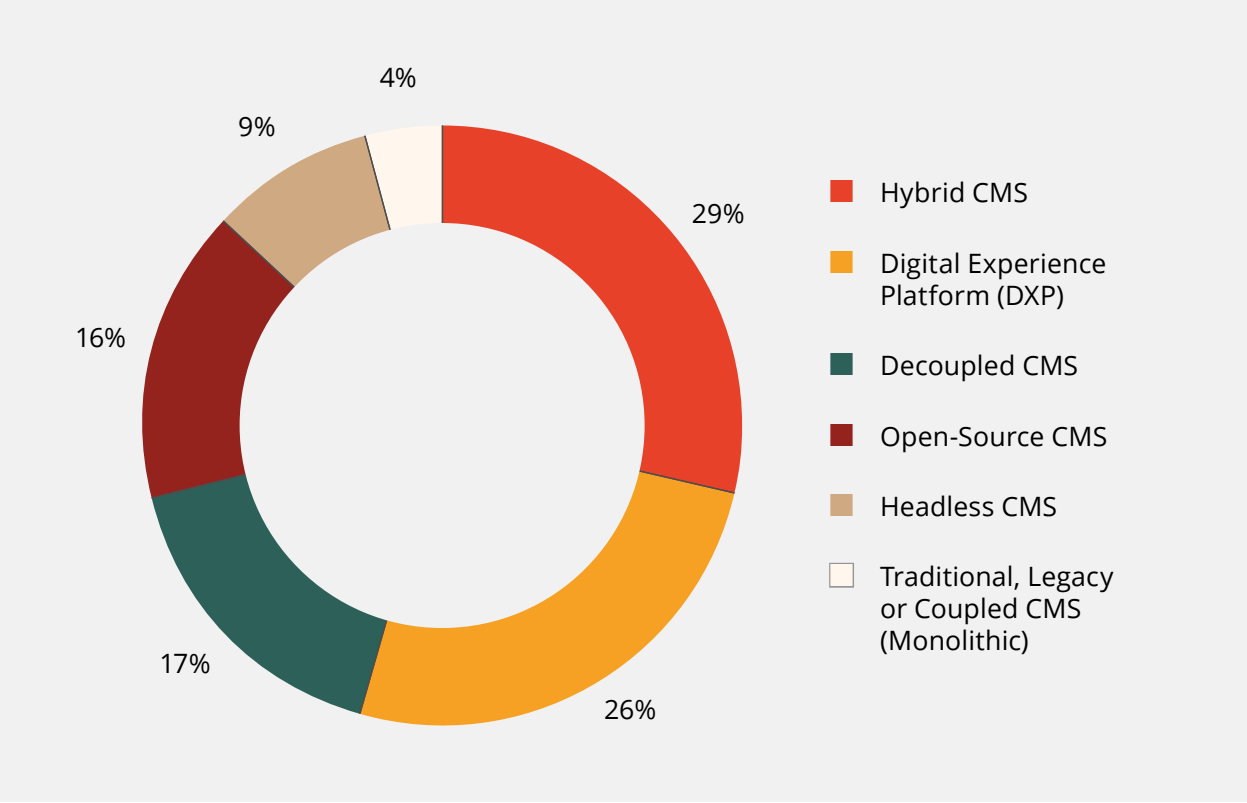
The modern CMS landscape is diverse, accommodating for a multitude of end-user requirements, spanning both online and offline experiences. While CMS platforms share certain fundamental capabilities—encompassing content creation, management and presentation—distinctions arise based on the level of adaptability, customization options and integration capabilities they offer. Organizations often leverage more than one CMS tool to meet the complex content demands of their business.

Among the various CMS types, hybrid CMS and Digital Experience Platforms represent the most commonly selected platforms, collectively preferred by approximately 55% of organizations. Notably, there has been a significant recent surge in the adoption of hybrid CMS and DXP platforms—within the last 12 months, 58% of organizations report adopting one of these two platforms. Among organizations that have chosen a CMS platform in the past 12 months, a substantial 42% have opted for a hybrid solution, while just 4% selected a traditional CMS. This shift underscores the evolving market dynamics in response to changing expectations, as well as the transitory journey CMS users are on in their shift from monolithic, legacy tools toward headless, composable CMSs. Organizations are increasingly breaking free from the confines of monolithic tools, favoring composable solutions that retain content creation and management capabilities while empowering them with greater flexibility to deliver distinctive digital experiences.



WHAT TYPE OF CMS DO YOU AND YOUR COMPANY UTILIZE MOST TODAY?

(% of respondents)



Source: Winterberry Group Survey (2023)

SEVERAL MARKET FORCES HAVE INFLUENCED CMS ADOPTION AND THE EVOLUTION OF THESE PLATFORMS:

Proliferation of Channels: Marketers are increasingly focused on delivering consistent brand experiences across a diverse channel set; to bridge the gap between channels and content elements, organizations seek CMS platforms that can ensure consistent brand experiences across channels, notably websites (88%), email (72%) and display (64%).

Omnichannel Personalization, at Scale: To deliver personalization at scale rapidly, organizations need a centralized source of truth for their content that can be deployed to multiple end points for consistent omnichannel experiences; 41% of organizations look for CMS platforms with integrated personalization capabilities, such as content management and deployment, marketing automation and customer relationship functionalities.

Growing Investment in Content: Organizations are increasingly dedicated to delivering consistent and engaging experiences across online and offline channels, intensifying the need for robust content creation, management and distribution strategies; legacy technology (47%), dispersed data and content assets (45%) and budget/time constraints (44%) represent the primary challenges faced by organizations in their content strategies.

Growth of Digital Commerce: As commerce has expanded beyond traditional brick-and-mortar storefronts to e-commerce, m-commerce and social commerce, brands are actively seeking CMS solutions to connect the in-person and online worlds; over 40% of organizations have integrated their CMS with a Marketing Automation or Commerce Platform, underscoring the importance of robust partner integrations to facilitate real-time content delivery, enable the creation of unique user experiences and support agile content deployment.

Understanding the CMS landscape and these demand drivers emphasizes CMS platforms' pivotal role in shaping cross-channel interactions in today's world.

> "The adoption of CMS technologies and the evolution of this ecosystem has largely been driven by customer demand. Consumers' expectations have gone up and to the right as far as the amount of content that can be assessed in the buy funnel. They expect more sophisticated engagements with the companies they work with, and they expect more content and more personalization than ever before."

- Head of Global Partnership Program, Global Experience Software Provider



CMS PLATFORM USE CASES

In response to market dynamics and the growing demand from customers for distinctive and consistent experiences across multiple channels, the landscape of content management has undergone a significant transformation in how it addresses various use cases to meet these consumer requirements. By analyzing how the various CMS platforms address specific organizational challenges, we can gain insight as to how the various CMS systems may cater to the distinct needs that span content creation, organizational enhancements and personalized digital experience requirements.



TRADITIONAL, LEGACY OR COUPLED CMS (MONOLITHIC)

- Simplified content management for businesses, with pre-designed templates that allow for basic customization of content and templates
- User-friendly interface developed for non-technical users



OPEN-SOURCE CMS

- Enables deployment of websites at low technology cost
- Mainly used for simple web-based content, intranet pages
- Additional use cases include focused/point experiences with limited focus on customization and personalization



DIGITAL EXPERIENCE PLATFORM (DXP)

- Integrated customer experience management to support and optimize customer journeys across channels
- Customer data management, insights and segmentation for personalization
- Streamlined multi-format content creation, deployment and management
- Delivery of consistent customer experiences across multiple digital endpoints driving commerce



HEADLESS CMS

- Highly customizable approach to front-end, allows for differentiated digital experiences
- Multi-channel content distribution for handling of varying content types across channels
- Streamlines back-end updates without impacting front-end presentation layer



DECOUPLED CMS

- Independent content management and distribution through APIs, provides for versatile content delivery to various applications
- Integration with third-party tools and systems
- Enhanced security features as presentation and content layers are separated



HYBRID CMS, A MIX OF TRADITIONAL AND HEADLESS OR DECOUPLED

- Combined tool with both traditional back-end architecture and templates coupled with a flexible front-end presentation layer
- Supports both structured content management and flexible distribution as it provides a bridge between traditional and modern content management capabilities

In essence, use cases across different types of CMS platforms share a common overarching goal: to facilitate the creation, storage, management and organization of content assets for utilization across various touchpoints within the customer journey, as recognized by nearly three quarters of organizations.

Beyond an organization's content management and deployment needs, organizations identified content, brand website and social marketing (53%), segmentation and personalization of experiences (49%) and the successful delivery of omnichannel experiences (44%) as the primary applications of their CMS platform.

WHICH APPLICATIONS OR USE CASES DO YOU CURRENTLY USE YOUR CMS PLATFORM FOR?

(% of respondents)

74%	71%	53%	49%	44%
Content creation planning, workflow and collaboration	Storage, management and organization of content assets	Content, brand website and social marketing	Segmentation and personalization of customer experiences	Delivery of cross-channel and/or omnichannel experiences
40%	**36%**	**36%**	**35%**	**18%**
Delivery of premium content (across TV/ video, digital media, subscriptions and syndications)	Enablement and enhancement of e-commerce and direct-to-consumer offerings (e.g., payment and shopping cart gateway integrations)	Knowledge base such as documentation and help centers	Management of e-commerce inventory	Intranet and training tools

Each CMS platform approaches these use cases slightly differently, offering distinct advantages and considerations. As such, it becomes the responsibility of each organization to define the predominant use cases that align with their objectives. Are they primarily focused on delivering consistent omnichannel experiences, creating user-friendly templated solutions, efficiently scaling content creation, or emphasizing differentiation? Moreover, organizations must factor in considerations such as resource availability and limitations, technological capabilities and integrations, as well as the extent of platform customization required when selecting the most suitable CMS platform for their specific needs.



TRADITIONAL, LEGACY OR COUPLED CMS (MONOLITHIC)

The traditional monolithic CMS emerged as a fundamental tool for website management, offering users a straightforward means of creating, editing and publishing predominantly text-based content on their web pages. These platforms closely couple front-end design and back-end content management, supplying pre-built and pre-designed templates that streamline the design process. The simplicity of these tools makes traditional monolithic platforms particularly appealing to less-technical users, as they greatly simplify the content management workflow—all organizations using a traditional CMS report its primary application is for the storage, management and organization of content assets, followed closely by content creation planning, workflow and collaboration features. As these platforms evolve, their focus is shifting towards delivering an accessible and user-friendly experience, along with editable plug-ins to facilitate content development and management across websites.

However, traditional CMS platforms come with inherent limitations. These platforms offer limited scope for website customization and the delivery of a unique user experience: just 25% of organizations reported using their traditional CMS to deliver premium content across digital channels such as TV/video, digital media and subscriptions. Customization options beyond the pre-built templates are usually minimal, constraining an organization's ability to create distinctive designs when compared to others using the same platform. Additionally, the tightly integrated nature of front-end design and back-end content management constrains an organization's ability to support a multi-channel experience, limiting the ability to create and distribute content across various digital formats. In fact, a staggering 83% of organizations cite the delivery of omnichannel customer experiences as their primary challenge when dealing with traditional CMSs, followed by half of organizations citing workflows as a significant challenge.

Furthermore, traditional CMS platforms demand substantial in-house resources to handle maintenance and updates, resulting in extended development cycles and higher costs. A third of organizations identify development as the primary cost associated with traditional CMS architectures, followed by maintenance and associated platform costs.

OPEN-SOURCE CMS

Open-source CMS tools share several similarities with traditional, monolithic platforms. Both offer pre-built templates that simplify design and enable users to deploy, manage and publish digital content. However, it's essential to recognize that there are several distinctions between these options, with the key differentiator being the "open" nature of the underlying code base in open-source CMS technologies. This openness allows the global developer community to contribute to and modify these tools.

Open-source CMS technologies empower organizations to harness an open-for-all base code to create a custom in-house CMS solution tailored to their specific needs at a fraction of the software cost. Organizations commonly use open-source CMS tools for content creation, planning, workflow and collaboration (71%). Additionally, about a third of organizations employ them for content, brand website and social marketing purposes.

However, this approach is not without its challenges: Nearly 60% of organizations find it difficult to scale these CMS tools, and roughly half encounter difficulties when integrating them into their existing tech stack and with other platforms. Moreover, while open-source CMS tools offer software cost benefits and accessible source code, nearly half of organizations identify data and security compliance as their top ownership cost for these tools. This underscores the importance of a robust data management and privacy strategy when using an open-source CMS.

Organizations must ensure they have the necessary in-house resources to support ongoing maintenance and development. Given the way these platforms are constructed, they rely heavily on the broader developer community's support for their advancement. While this fosters greater customization possibilities through code modification and ongoing improvements and maintenance to the platform, challenges exist as support may be limited due to constrained workflows or differences in programming languages, potentially inhibiting collaboration and the availability of developers for enhancements.



DIGITAL EXPERIENCE PLATFORMS (DXP)

DXPs represent a comprehensive solution for organizations, offering an integrated, end-to-end platform encompassing omnichannel content creation, management and delivery, alongside customer data, insights and personalization capabilities. These platforms empower businesses to oversee and influence the entire customer journey, optimizing each touchpoint for a seamless experience across digital channels. DXPs are built to provide the necessary tools to manage end-to-end digital transactions, which may be why over two-thirds of organizations reported using their DXP to manage e-commerce inventory. When organizations were asked why they opted for a Digital Experience Platform over traditional or headless CMS tools, nearly two-thirds chose DXPs for their ability to deliver and enhance omnichannel digital experiences.

Beyond facilitating omnichannel digital experiences, DXPs equip organizations with customer insights and segmentation capabilities, driving personalization and enhancing digital experiences across various touchpoints. Notably, 90% of organizations utilizing a DXP consider the integration of a journey orchestration and decisioning platform a crucial factor when evaluating this type of CMS platform. By harnessing data-driven insights and decision-making, DXPs empower marketers to deliver relevant content that resonates with their audience, fostering deeper connections and higher engagement rates. Historically, many DXPs have evolved through a series of acquisitions, aimed at supporting an organization's delivery of integrated omnichannel experiences. Consequently, DXPs may incur higher ownership costs during the implementation and integration phases by potentially requiring extensive integration efforts. In fact, 60% of organizations cite integrating across the tech stack and in-house platforms as a top challenge when dealing with DXPs. However, once these tools are implemented, they tend to be less resource-intensive to operate, with just 12% of organizations reporting ongoing maintenance as a primary cost consideration.

> "I think of a fully digital experience platform as bringing end-to-end elements of audience testing, segmentation and the full marketing stack, including integrations DAM, workflow management, etc."

- COO/CTP, CPG Brand

HEADLESS AND DECOUPLED CMS

The ubiquitous nature of digital experiences in the customer journey has forced organizations to distinguish their user interactions from those of competitor offerings. Traditional monolithic CMS platforms, which tightly integrate content creation and presentation, impose limitations on content delivery across various channels and platforms. This homogenizes the customer journey and hinders the differentiation of user experiences among organizations using shared CMS platforms. As businesses explore ways to set themselves apart, they are increasingly moving away from tightly coupled front- and back-end solutions and adapting a composable approach that offers greater flexibility across their tech stack. This shift has led to the emergence of headless and decoupled CMS tools, which fundamentally separate content creation and management (back-end) from the presentation layer (front-end).

HEADLESS CMS

In the realm of delivering content across a broad spectrum of online and offline channels, organizations shifting to a composable architecture for their martech stack have embraced the "headless" CMS approach. This approach separates the back-end content management architecture from front-end presentation and delivery, enabling content to be accessed via APIs for display on any device. Headless CMS platforms empower organizations to manage, store and edit content independently from their ultimate destination, making it versatile for distribution across various applications, including websites and mobile apps. Headless CMS solutions have gained popularity among organizations operating in multi-channel content environments due to their flexible, agile and rapid content manipulation and deployment capabilities. Nearly all organizations employing a headless CMS reported its frequent use in designing and delivering digital customer experiences: two-thirds of organizations reported that their headless CMS helped facilitate the delivery of premium content assets across digital mediums, such as TV and video.

> "By nature of need, CMS [architectures] have changed to accommodate the resources clients need. A full staff of back-end developers was needed to manage platforms, but now you can get away with a staff of front-end developers managing APIs. Headless has shifted power to marketing."

- CEO, Digital Experience Agency

DECOUPLED CMS

While sharing similarities with headless CMS, decoupled CMS solutions offer users a slightly different approach to content management. These tools separate front-end design and back-end content repository features, providing greater flexibility for organizations to create a composable solution that supports robust back-end content management capabilities. Simultaneously, these platforms integrate with other systems to support front-end technologies and enable the design of differentiated user experiences. In contrast to the headless CMS, which often emphasizes the consumer aspect, a striking 96% of businesses employing a decoupled CMS indicated that it is most frequently used for designing and delivering content and creative for employee experiences. This underscores the robust capabilities of these tools on the back-end.

> "Headless CMS win out in their ability to be flexible for marketers and flexible in cost."

- Head of Global Partnership Program, Global Experience Software Provider

HYBRID CMS

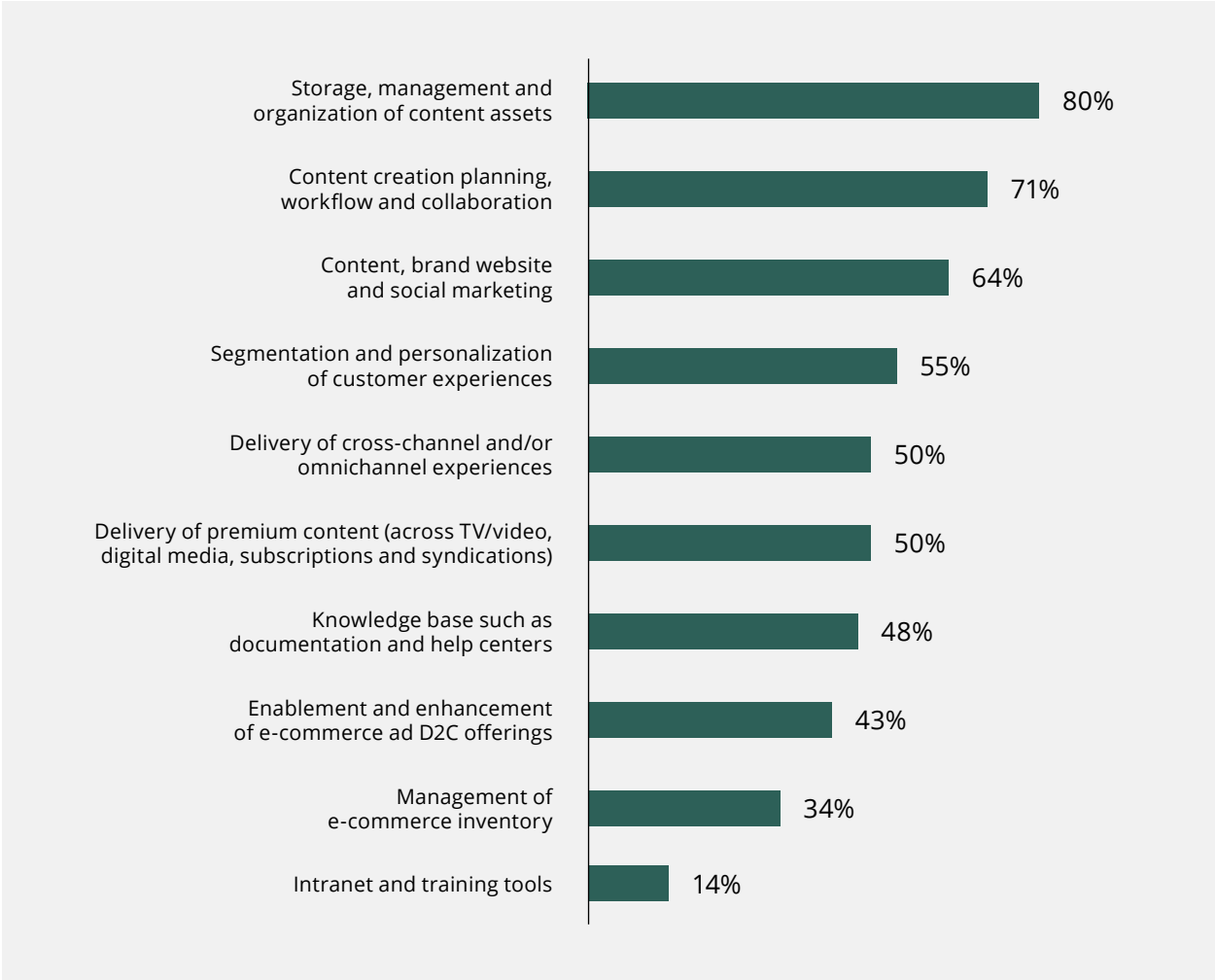
Hybrid CMS platforms represent a combination of traditional and headless/decoupled CMS capabilities, offering the flexibility and customization of content delivery while maintaining structured content presentation and back-end management systems. These platforms empower businesses to exercise enhanced control and flexibility over the front-end presentation layer while upholding consistent branding and a unified user experience across diverse digital channels.

In the past year, there has been a notable surge in the adoption of hybrid CMS solutions as organizations embark on a transition from traditional, monolithic platforms to composable, best-in-breed solutions. Hybrid CMS platforms serve as a crucial intermediary step in this technological evolution, allowing organizations to ensure they possess the necessary resources and internal capabilities to implement and deliver a modular technology solution effectively. Moreover, hybrid solutions offer valuable benefits by providing non-technical users with a structured and component-based approach to manipulate content, simultaneously creating opportunities for the development of distinctive digital experiences and delivering content to offline channel platforms.

> "With the hybrid architecture, it feels like I found a way to get our marketing team the things they need while still being able to choose the best, cost-effective system that fits into our whole organization's strategy."
>
> *- COO/CTO, CPG Brand*

WHICH APPLICATIONS OR USE CASES DO YOU CURRENTLY USE YOUR HYBRID CMS FOR?

(% of respondents)



Source: Winterberry Group Survey (2023)

CHALLENGES AND CONSIDERATIONS OF CMS PLATFORMS

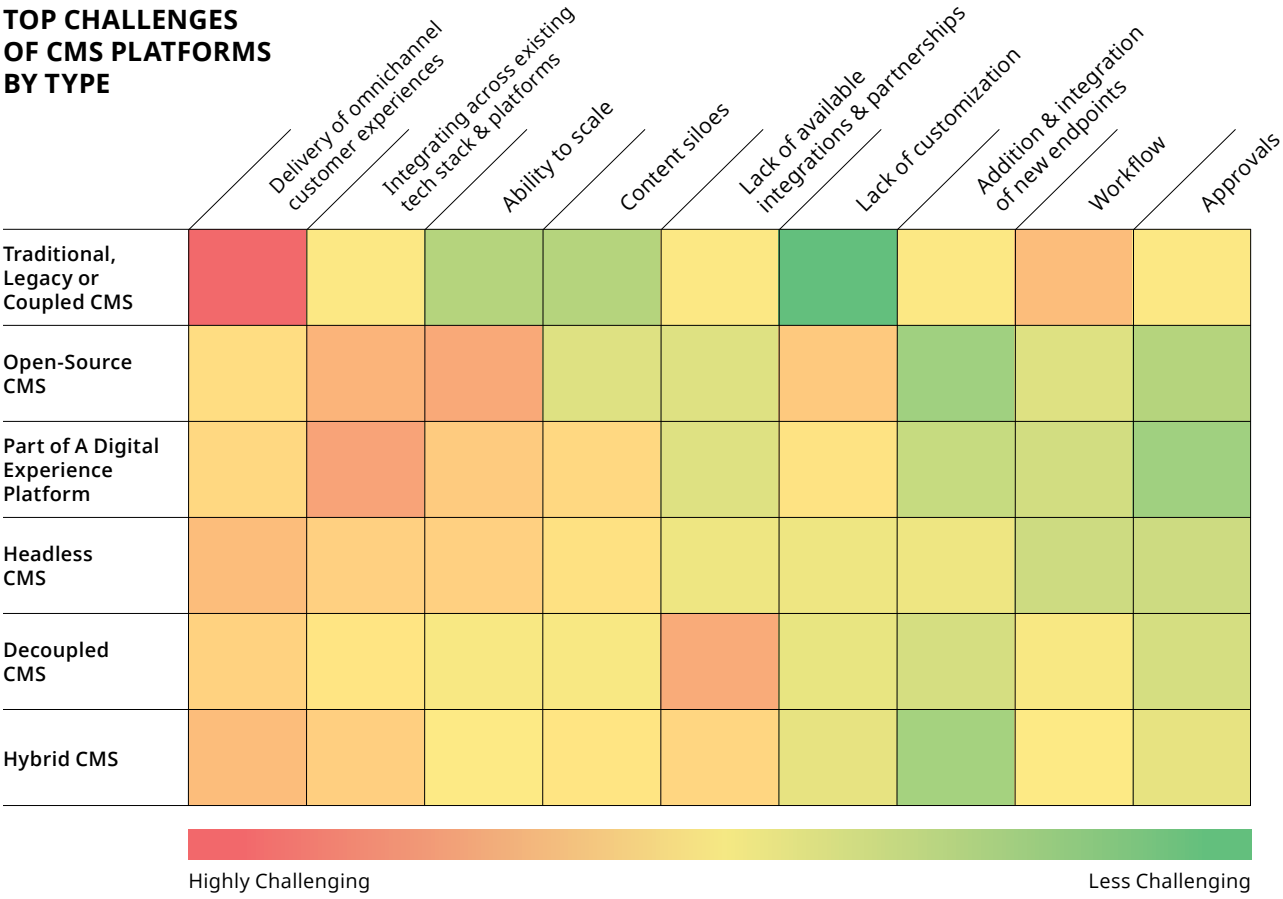
The adoption of CMS platforms has played a pivotal role in allowing organizations to efficiently create and manage substantial volumes of content, facilitating the delivery of consistent experiences across diverse channels and touchpoints. While these platforms offer an array of benefits, harnessing the full potential of CMSs presents its own set of challenges and considerations. By identifying the obstacles users encounter in content creation, management and distribution - and how various CMS platforms influence these challenges - stakeholders can better equip themselves to devise effective strategies for overcoming these barriers.

The challenges organizations encounter with their CMS tools often vary depending on the type of platform they employ. Across all CMS platforms, integrations emerge as a primary hurdle, with 45% of organizations citing the integration of existing technology stacks and platforms as one of their top three challenges. This is closely followed by concerns about the availability of integrations and partnerships.

However, beyond these common issues, the unique intricacies of each platform reveal their own distinct challenges. Traditional CMS platforms, for instance, tend to lag behind other tools in their ability to deliver omnichannel customer experiences. Open-source CMSs are challenged in particular when it comes to scaling their offerings. Furthermore, while integration remains a top barrier for all organizations, this challenge becomes especially pronounced for those utilizing a DXP, as they grapple with the complexities of integrating it with existing tools within their technology stack. For organizations in the process of selecting a CMS platform, it is crucial to comprehensively understand the challenges associated with each option and develop a well-defined plan for successfully overcoming these obstacles during the CMS implementation process.

> "With our [CMS] implementation, we faced many challenges. Learning the system, understanding workflows and figuring out how we wanted things architectured were all a challenge beyond the standard onboarding barriers."
>
> *- COO/CTP, CPG Brand*

TOP CHALLENGES OF CMS PLATFORMS BY TYPE



Note: Color coding represents % of respondents who have identified the corresponding challenge as a top 3 challenge; green colors indicate it was less of a challenge, whereas orange-red colors indicate it was a top 3 challenges

Source: Winterberry Group Survey (2023)

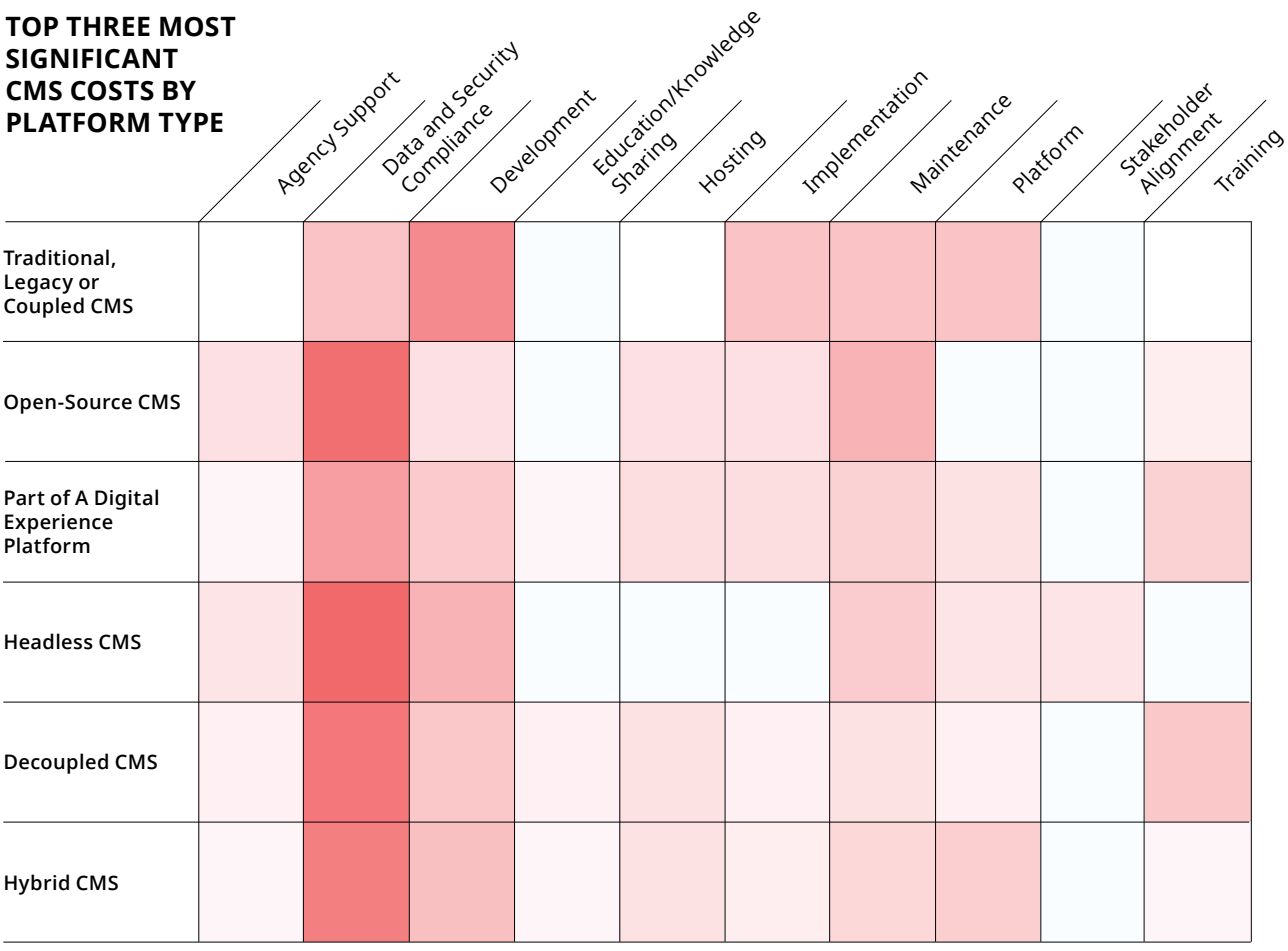
TOTAL COST OF CMS OWNERSHIP

Selecting a CMS is often a nuanced process, contingent on an organization's specific use cases and business challenges. It involves asking critical questions: *Does the organization prioritize cross-channel adaptability? Is a structured content development approach necessary? Does the organization possess the requisite talent and resources for effective platform maintenance?*

Beyond these inquiries, understanding the cost of ownership associated with different CMS platforms is paramount. The continually evolving technology landscape, market dynamics and user experience trends have significantly influenced the nature of CMS platforms and their associated costs. As CMSs have grown increasingly sophisticated, the expenses tied to maintaining these platforms have similarly expanded.

The cost landscape of CMS platforms exhibits notable variations depending on the type of CMS an organization adopts. While several cost considerations remain consistent across all CMS platforms—encompassing aspects like development, maintenance and implementation—others assume a more prominent role dependent on the chosen platform. For traditional CMS users, development costs tend to be notably higher in comparison to other platforms. In contrast, open-source and headless CMS users encounter heightened costs related to data security and compliance due to the imperative of safeguarding privacy. Across the board, organizations identify data security and compliance (35%), development (16%) and maintenance (13%) as the primary cost drivers associated with their chosen CMS.

TOP THREE MOST SIGNIFICANT CMS COSTS BY PLATFORM TYPE



Note: Darker red boxes correspond to higher cost driver as identified by greater % of respondents

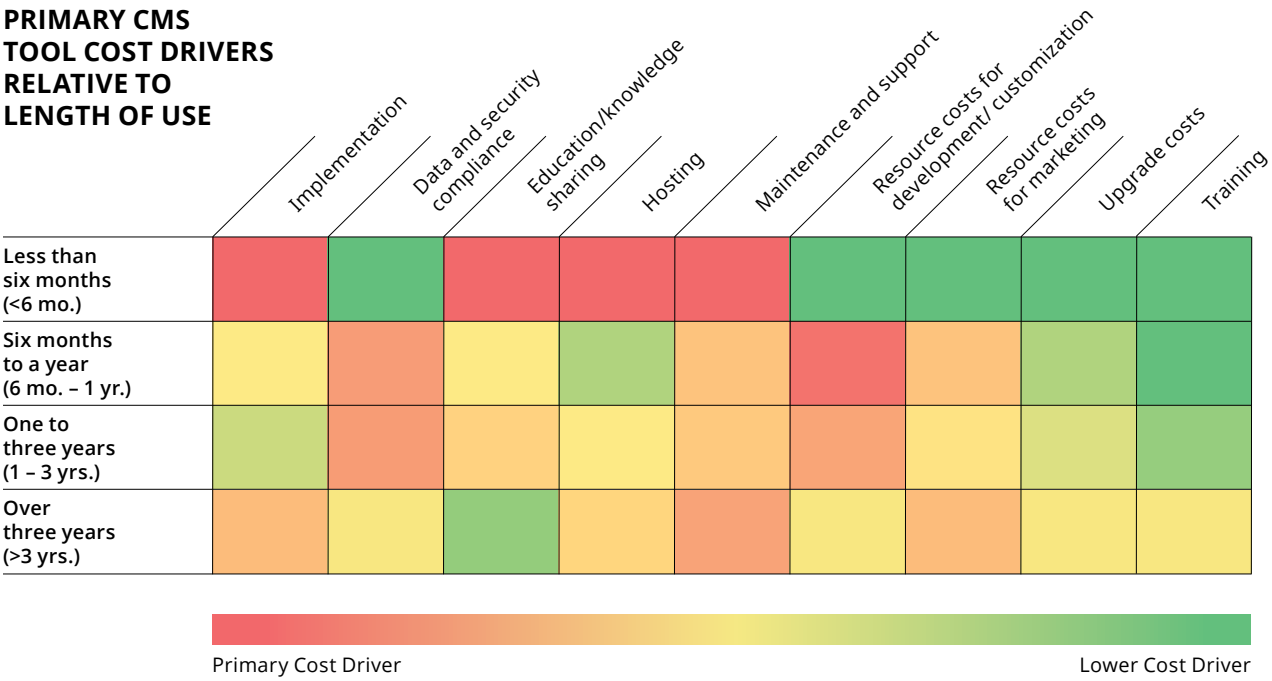
Source: Winterberry Group Survey (2023)

Furthermore, the size and complexity of content within an organization serves as a pivotal factor in comprehending the primary cost drivers of CMS platforms, reflecting the scale and needs of each business. Smaller organizations, those with annual revenues of less than $100 million, commonly attribute equal significance to maintenance and data/security compliance as cost drivers. Conversely, as the size of organizations increases, CMS expenses become more diversified. For instance, nearly a quarter of organizations with annual revenues exceeding $2.5 billion identify data security as their primary cost driver. Meanwhile, other factors—including maintenance, platform costs, education and training—are relatively evenly distributed within these larger organizations.

While some CMS costs remain consistent over the platform's lifecycle, others fluctuate depending on the life stage of the CMS. In the initial 6 months of selecting and implementing a CMS, organizations evenly allocate costs to implementation, maintenance and support, hosting, and internal educational and knowledge-sharing efforts.

However, as time progresses, these cost distributions undergo changes. In the first year, 25% of organizations identify data and security compliance as a significant cost consideration, followed closely by resource costs for development and customization work (22%). As CMS usage extends, costs tend to diversify further, with various cost drivers—such as data and security compliance, maintenance and support, as well as resource expenses for development, customization and marketing—contributing between 11% and 19% of the overall CMS costs.

PRIMARY CMS TOOL COST DRIVERS RELATIVE TO LENGTH OF USE



Note: Color coding represents % of respondents who have identified the corresponding cost driver as a top 3 driver; green colors indicate it was less of a cost consideration, whereas orange-red colors indicate it was a primary cost factor

Source: Winterberry Group Survey (2023)

When assessing how costs evolve over time across various types of CMS platforms, distinct trends come to light: In the case of traditional CMS, the initial year sees an even distribution between data and security compliance and maintenance/support costs. However, as time progresses, these expenses become more evenly distributed. By the third year, expenditures are fairly balanced among data and security (30%), implementation (20%) and hosting (20%), while other cost factors like resource allocation, maintenance and upgrades become less pronounced.

Similarly, organizations utilizing open-source CMS tools encounter a comparable cost distribution, with data and security compliance (30%) taking precedence, followed closely by hosting (22%) and resource allocation (22%). These costs tend to remain relatively stable over time, although open-source CMS users note that training and resource expenses become more significant as they adapt to evolving source code and knowledge maintenance.

For headless and decoupled CMSs, the initial year exhibits a fairly even allocation of costs across implementation, data and security, hosting, maintenance and resources. As time advances, the cost drivers for these CMS tools concentrate slightly more on resources for development/customization work (25%), maintenance and support (20%), and data and security compliance (20%) aligning with common trends observed across all CMS types.

While certain costs will remain relatively stable throughout the CMS lifecycle, it is crucial to grasp the specific cost drivers inherent to each CMS tool and how they are prone to change over time. Organizations should carefully evaluate both the technical infrastructure demands and the resource prerequisites of their business when choosing a CMS, as these factors can exert a substantial influence on the associated costs.

THE OUTLOOK FOR THE CMS MARKET

The future for the CMS market is promising, characterized by substantial growth and transformation in the years ahead.

This transformation will be propelled by a convergence of technological advancements, the ever-evolving omnichannel experiences consumers expect and shifting business priorities. CMS platforms have already cemented their status as crucial tools for organizations seeking to efficiently create, manage and optimize extensive volumes of content across an array of digital and offline touchpoints. As the digital landscape continues its rapid evolution, CMS platforms are poised to evolve in concert. Across the spectrum, organizations are signaling their intent to continue investing in these tools, with a noteworthy 70% of them preparing to increase their CMS budgets. This strategic move aligns with the ongoing transformation of their digital experiences.

We expect the CMS market's trajectory will be influenced by a range of pivotal factors:

OMNICHANNEL CONTENT DELIVERY

Organizations are constantly generating content and disseminating it across a diverse array of digital channels from web and display to mobile, social media and beyond. As customers traverse these digital channels in their interactions with businesses, CMS platforms must evolve to ensure consistent content delivery and user experiences. The ability to offer robust omnichannel content capabilities will be will be paramount as this will enable will empower businesses to effectively manage and distribute content across a multitude of channels while upholding brand consistency and user satisfaction.

DATA-DRIVEN INSIGHTS FOR PERSONALIZATION

In their pursuit of scaling personalization, organizations are increasingly reliant on CMS platforms that provide or seamlessly integrate with analytics tools. These tools serve as the linchpin for testing targeting strategies, gleaning valuable insights and reporting on the outcomes. Moreover, the integration of AI for the analysis of user behavior and preferences, alongside the incorporation of these insights within CMS tools, equips marketers with the capability to deliver tailored content. This, in turn, elevates the overall user experience, fostering deeper engagement and satisfaction.

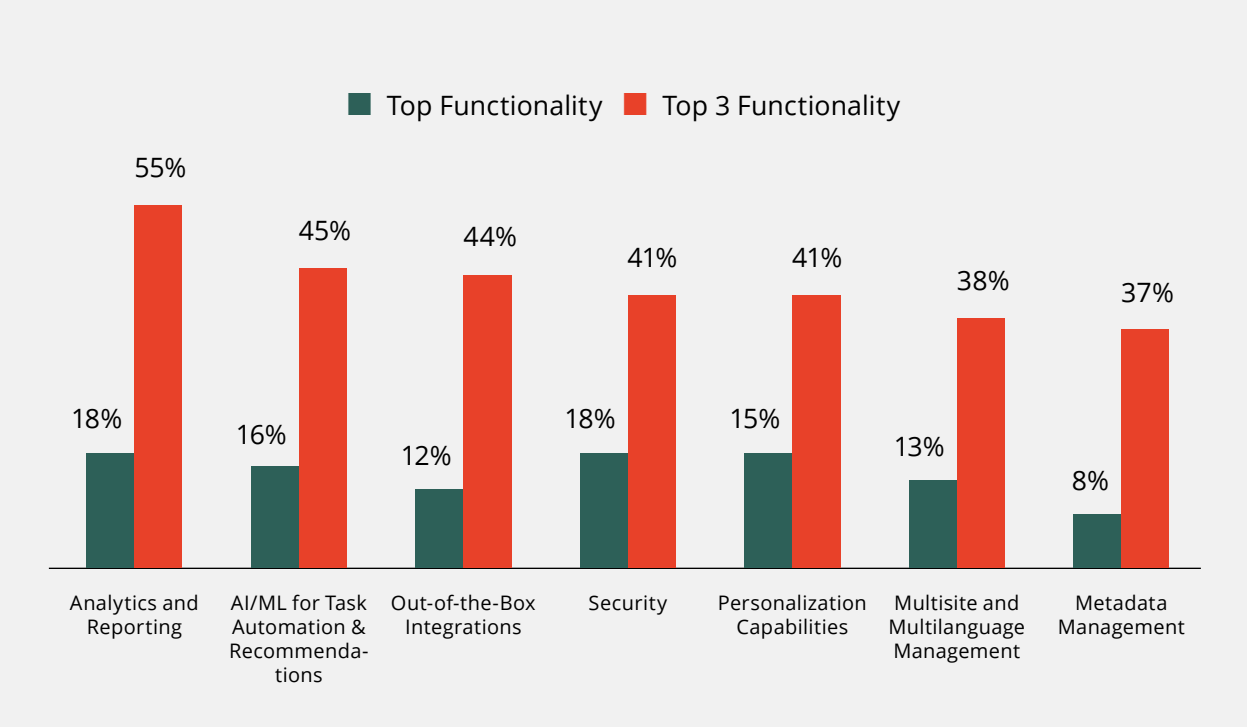
AI-POWERED CONTENT CREATION AND CURATION

The proliferation of digital channels and the escalating demand for personalized content have generated an intensified requirement for content creation within organizations. As AI solutions progressively permeate the market, they are anticipated to significantly heighten the volume of generated content. This surge in content generation will in turn require a more rigorous approach to content management. Consequently, organizations are actively seeking CMS platforms equipped with AI functionalities. This is particularly significant in the context of streamlining content creation, curation and distribution, as well as enhancing the quality and selection of content presented to users. Notably, nearly half of businesses identify AI and machine learning capabilities for task automation and recommendations as a decisive factor when evaluating CMS platforms' supporting functionalities.



MOST SIGNIFICANT SUPPORTING FUNCTIONALITIES WHEN EVALUATING CMS SOLUTIONS

(% of respondents)



Source: Winterberry Group Survey (2023)

While many opportunities will drive the advancement of CMS platforms, it is also important to be mindful of considerations that could impact how users engage with these tools:

SECURITY AND DATA PRIVACY

As we look ahead, it is paramount for CMS users to give the utmost attention to data privacy in compliance with evolving regulatory standards across the US and EU. Ensuring robust data security measures is essential to guarantee the successful delivery of data-compliant digital experiences.

SCALABILITY

Meeting the burgeoning demands for content will be a critical concern. Users should prioritize selecting a CMS that can accommodate the surging volume of content being managed based on organizational demand. This will enable seamless user experiences, even during periods of high content load and increased traffic.

> "CMS is critical from a content management perspective and targeting the highest value customer. You want to be able to make content once and reuse it. Digital presence is becoming more important in the application ecosystem. Once the digital component came into play, we had a way to tie communication strategy with digital strategy. These platforms are delivering on this promise of tying digital channels together with the traditional channels to create a seamless customer experience."
>
> *– Director of Enterprise Architecture, Regional Bank*

VENDOR LOCK-IN

When making decisions about CMS platforms, careful consideration of the organization's diverse needs is imperative. Key decision-makers and influencers must assess the ease of migration and flexibility to avoid potential vendor lock-in scenarios, ensuring the chosen CMS aligns with long-term goals and adaptability.

KEY CONSIDERATIONS FOR CMS SELECTION

The choice of a CMS platform is highly contingent on an organization's specific needs and the primary use cases it aims to address:

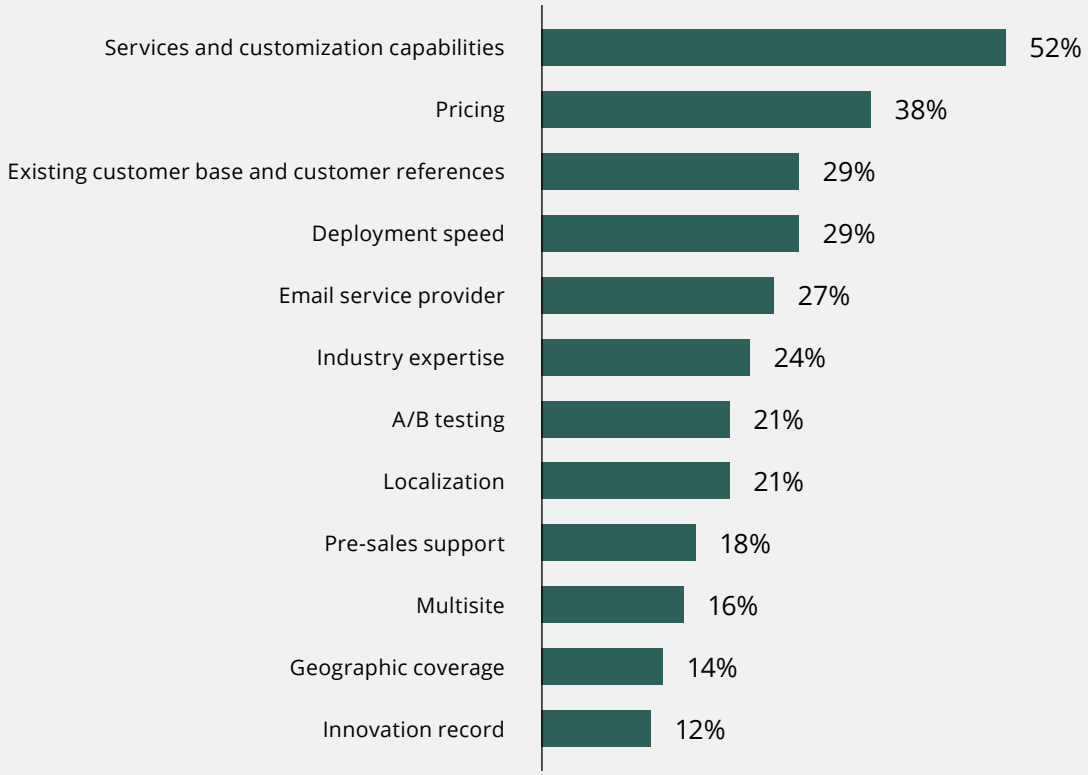
- Does the organization prioritize flexibility or a structured approach to content design and manipulation?
- Are there adequate technical resources in-house, or will the tool be utilized by non-technical practitioners?
- Which channels will the organization primarily utilize to activate its content?

In addition to understanding the use cases a CMS will address, organizations consider a myriad of factors when evaluating a CMS provider. At the forefront of these considerations is the level of services and customization offered, followed closely by pricing and deployment.



TOP THREE CONSIDERATIONS WHEN EVALUATING A CMS PROVIDER

(% of respondents)



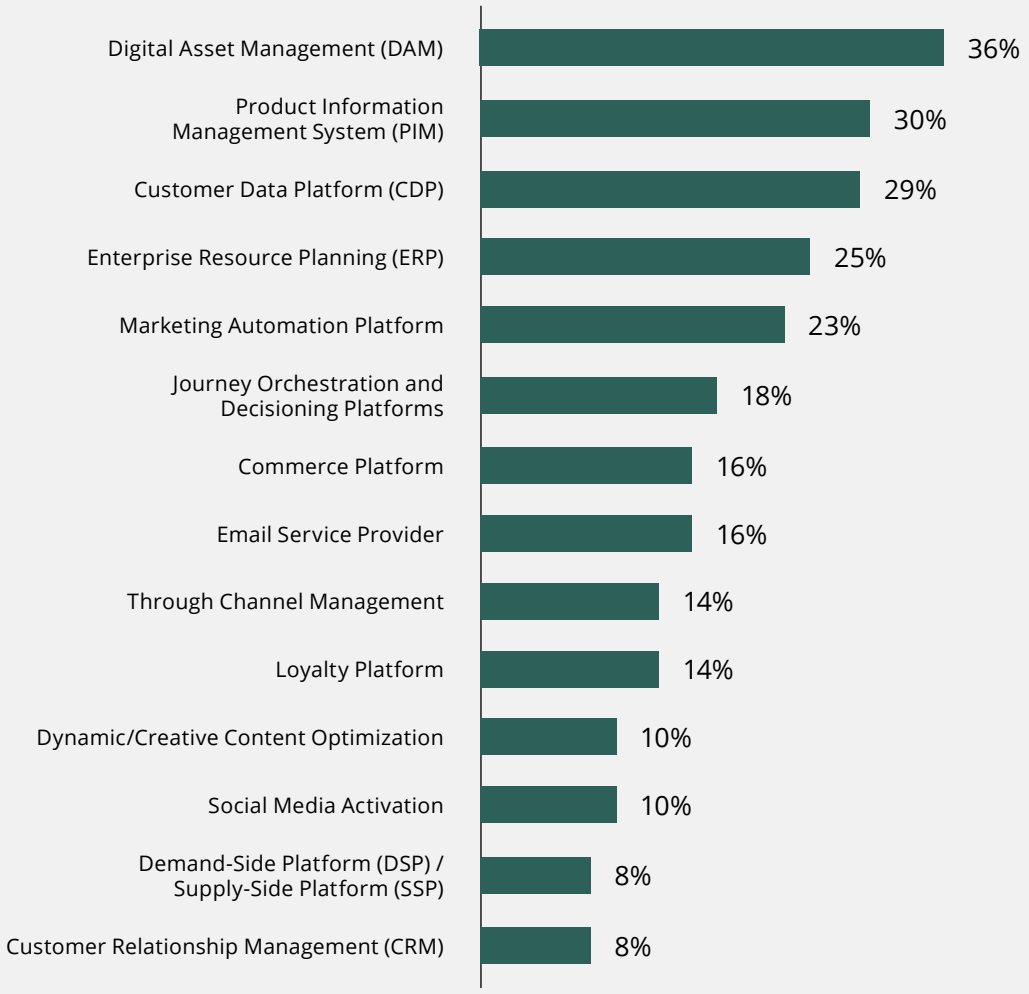
Source: Winterberry Group Survey (2023)

The integration capability of CMS platforms with other systems plays a pivotal role in the decision-making process. These platforms serve as integral components of an organization's overarching marketing technology stack. Ensuring that CMSs can integrate with other solutions within the tech stack empowers organizations to adopt a comprehensive approach to their omnichannel digital strategies. The most highly valued CMS integrations among organizations are Digital Asset Management (DAM) and Product Information Management (PIM) Systems, accounting for 36% and 30% of organizations, respectively. This underscores broader trends in digital commerce, where organizations grapple with the management of an ever-expanding volume of product images, information and digital content linked to their commerce objectives.

> "When you want to be differentiated in the digital space you cannot sit on packaged Digital Experience Platforms—it doesn't mean you eliminate them, but you start moving towards new solutions and leverage the platforms that make sense. If digital is a primary channel, you cannot rely solely on monolithic platforms."
>
> *– SVP, Global Athletic Company*

MOST SIGNIFICANT INTEGRATIONS WHEN EVALUATING CMS TOOL

(% of respondents)



Source: Winterberry Group Survey (2023)

ORGANIZATIONAL DECISION MAKERS

When selecting a CMS platform, it is important to identify the key organizational stakeholders and influencers to ensure the successful implementation and adoption of the platform. These individuals hold pivotal roles in orchestrating and executing digital experiences, whether through back-end systems integrations or front-end strategic planning, and they significantly impact the identification, selection and implementation of technology in support of these endeavors.

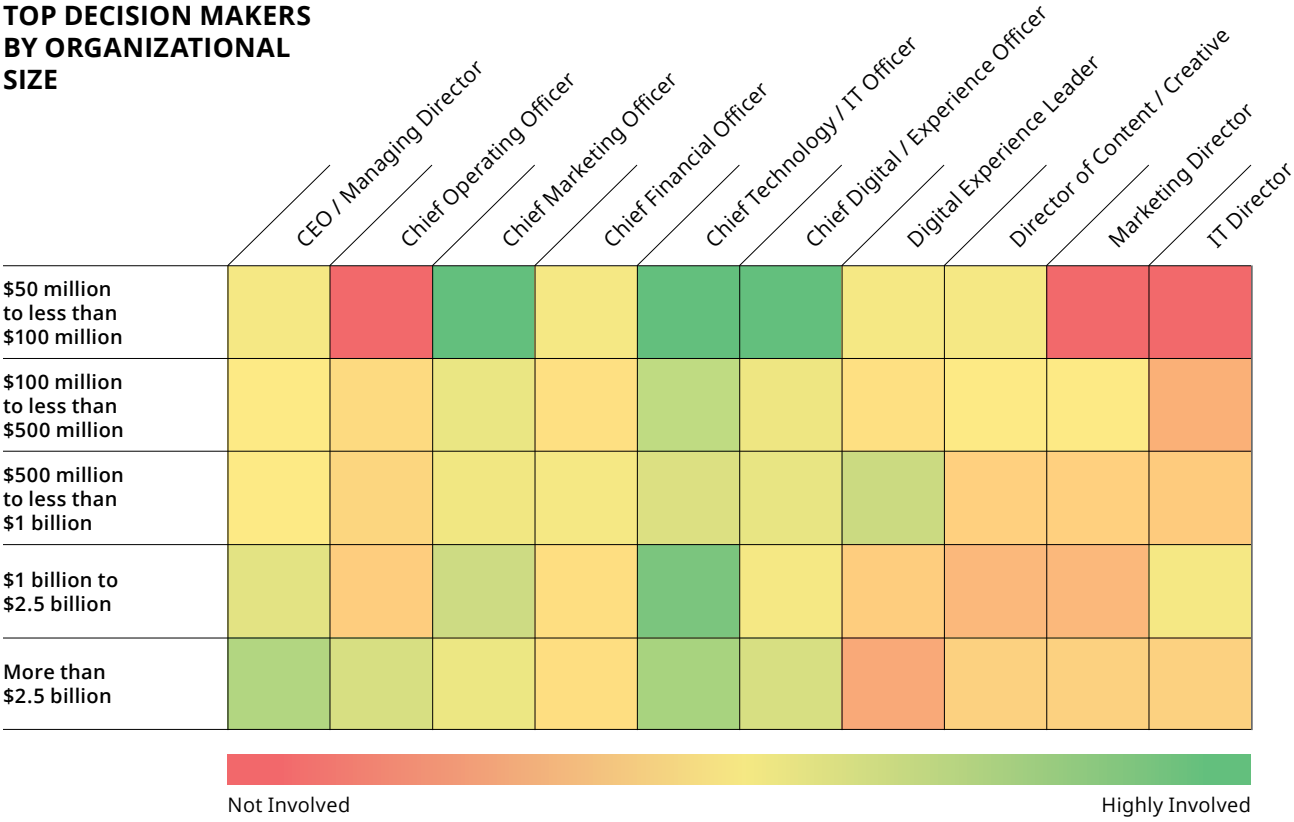
Among the top decision-makers identified by organizations, regardless of size or functional group, are Chief Technology/IT Officers (74%), Chief Digital/Experience Officers (58%) and Chief Marketing Officers (57%). These groups play crucial roles in shaping digital experiences and hold substantial influence in the choice and deployment of technology solutions.

> "CEOs understand the deep, broad ramifications of negative customer feedback...[but] the power dynamic has shifted back to the marketer."
>
> *– Head of Global Partnership Program, Global Experience Software Provider*

The role of decision-makers may evolve with the size and complexity of an organization. As companies expand, either in terms of revenue or content complexity, it becomes more common for Chief Technology/IT Officers to take on a prominent role in CMS platform selection. Conversely, in smaller organizations, decision-making can be more dispersed across functional groups, reflecting the multifaceted nature of decision-making processes.



TOP DECISION MAKERS BY ORGANIZATIONAL SIZE



Note: Color coding represents % of respondents who have identified the role as a top 3 decision-maker within their organizations; green colors indicate role is highly involved in CMS decision-making, whereas orange-red colors indicate role is less involved

Source: Winterberry Group Survey (2023)

In larger organizations, Chief Technology Officers (CTOs) often oversee the broader, complex technology infrastructure. Their deep understanding of technical requirements and integration needs makes them essential contributors to the CMS platform selection process. CTOs can provide valuable insights into how a new platform aligns with the existing technology ecosystem, offer feedback on compatibility and outline the necessary resources for a successful implementation.

Beyond the CTO, non-technical stakeholders within marketing, digital transformation and customer experience groups are also important influencers/decision makers of CMS platforms. These functional leaders are responsible for executing digital experiences, design and maintaining alignment with marketing strategies. Chief Digital/Experience Officers and Chief Marketing Officers, for instance, bring valuable perspectives to CMS platform selection, particularly concerning multimedia content and omnichannel strategies.

When assessing an organization's structure, technical complexity and decision-making authority, it becomes evident that CMS adoption and usage may fall under the purview of technical, IT-oriented groups, non-technical marketing and digital experience-focused teams or a combination of both. Involving these stakeholders early and considering their insights is crucial to making an informed and effective CMS platform selection.

As organizations embark on the journey of selecting a CMS, it is crucial to navigate through the multitude of factors that can significantly impact the choice of the right CMS platform. This selection process closely mirrors the organization's needs and goals, with each element reflecting a vital aspect. By carefully evaluating these considerations, businesses can lay the foundation for a successful CMS implementation that aligns with their specific use cases and requirements.



CMS Selection Considerations:

BUDGET ALLOCATION: WHAT IS THE ALLOCATED BUDGET FOR ACQUIRING, IMPLEMENTING AND MAINTAINING A CMS PLATFORM?

One of the cornerstone considerations in selecting a CMS revolves around budget allocation. Organizations need to determine the financial resources available for acquiring, implementing and maintaining a CMS platform. Understanding the budget limitations helps in narrowing down choices and ensuring that the selected CMS aligns with the organization's financial obligations.

CONTENT DIVERSITY AND VOLUME: WHAT TYPES OF CONTENT DOES THE ORGANIZATION PRIMARILY DEAL WITH, AND WHAT ARE THE CONTENT VOLUME AND COMPLEXITY (E.G., MEDIA TYPES) REQUIRED?

The nature of content an organization deals with plays a pivotal role in CMS selection. Questions arise regarding the types of content, their volume and complexity, including various media types. A detailed assessment of content needs ensures that the chosen CMS can efficiently manage and deliver the diverse content demanded by today's digital landscape.

TALENT AND USER EXPERTISE: DOES THE ORGANIZATION HAVE IN-HOUSE TECHNICAL EXPERTISE FOR CMS MANAGEMENT, OR IS THERE A NEED FOR USER-FRIENDLY INTERFACES THAT NON-TECHNICAL STAFF CAN OPERATE?

The level of technical expertise within the organization is another critical factor. Some organizations possess in-house technical prowess for CMS management, while others rely on user-friendly interfaces that allow non-technical staff to operate the system effectively. Recognizing the existing skill set within the organization is paramount in selecting a CMS that aligns with user capabilities and requirements.

INTEGRATION CAPABILITIES: WHAT EXISTING SYSTEMS, DATA AND ADDITIONAL TECHNOLOGY INFRASTRUCTURE MUST THE CMS SEAMLESSLY INTEGRATE WITH TO SUPPORT CROSS-FUNCTIONAL OPERATIONS, DATA SHARING AND USE?

CMS platforms do not operate in isolation; they are part of a broader technological ecosystem. Therefore, it is essential to evaluate what existing systems, data repositories and additional technology infrastructure the CMS must seamlessly integrate with. This consideration is fundamental for supporting cross-functional operations, data sharing and leveraging existing technology investments effectively.

STRUCTURED WORKFLOWS AND TEMPLATES: ARE THERE SPECIFIC USER GROUPS OR ROLES WITHIN THE ORGANIZATION THAT REQUIRE STRUCTURED WORKFLOWS AND CONTENT MANAGEMENT, AND IF SO, WHAT LEVEL OF STRUCTURE IS NECESSARY TO MEET THEIR NEEDS?

Within an organization, different user groups or roles may require structured workflows and content management capabilities. This raises questions about the extent of structure needed to meet the specific needs of these groups. Determining the level of structure necessary helps in selecting a CMS that can accommodate and enhance various workflows and content management processes.

These CMS selection considerations offer organizations a framework to make informed decisions. By exploring these critical topics, organizations can strategically select a CMS platform that not only aligns with their budget and content requirements, but also takes into account existing talent, seamlessly integrates with their technology stack and establishes a structure to support user requirements. These considerations serve as the cornerstone of a thoughtful CMS selection process.



GLOSSARY

APPLICATION PROGRAMMING INTERFACE (API)
A set of rules and protocols that allows different software applications to communicate with each other by defining the rules and methods for how they can exchange data.

ARTIFICIAL INTELLIGENCE (AI)
The simulation of human intelligence processes by machines, especially computer systems. The ultimate objective of AI is to emulate human behavior through processing information (leveraging techniques such as ML, making ML a subset of AI) and acting upon this information.

BACK-END
The administrative control panel of the CMS where administrators can manage and organize content. It is not visible to the public and is used to create, edit and organize content in addition to configuring settings and updating/maintaining websites.

CONTENT MANAGEMENT SYSTEM (CMS)
An application designed to manage the creation, storage and distribution of digital content—spanning text, images, video and other multimedia elements—across digital channels, such as websites, mobile apps and other online channel. CMS platforms enable users to take a simplified approach to creating, editing and managing digital content across their desired customer touchpoints.

COMMERCE PLATFORM
Comprehensive digital system that enables businesses to sell their products and services online, manage e-commerce operations and provide a seamless experience for customers.

DECISIONING
The process of leveraging data and algorithms to make data-driven, real-time decisions to best personalize marketing messaging, ensuring relevance for customers

DECOUPLED CMS
Solutions where content management functionalities (including centralized storage and content creation) are separated from the presentation layer, allowing support of multiple front-end interfaces and platforms.

DIRECT-TO-CONSUMER (D2C)
Business model in which companies sell their products and services directly to the consumer, bypassing intermediaries like retailers/wholesalers.

DIGITAL ASSET MANAGEMENT (DAM)
A centralized platform that allows organizations to store, organize, retrieve and manage digital assets for efficient content storage and distribution.

DIGITAL EXPERIENCE PLATFORM (DXP)
Integrated platform(s) that encompass a spectrum of solutions, including data, intelligence and activation capabilities; these platforms maintain a comprehensive focus on content, analytics, orchestration/decisioning, activation and commerce use cases, with content capabilities representing just one facet of their expansive suite of offerings.

E-COMMERCE
Buying and selling of products and services over the internet via digital transactions and payments.

FRONT-END
The user-facing or public component of a website. Its features include its design, layout and presentation of content that is visible to viewers when visiting the site. The front-end displays what is managed by the back-end.

HEADLESS CMS
API-based platforms where content and presentation layers operate independently; this separation allows for the creation of component-based digital experiences that are compatible across various systems. Content is managed and delivered via APIs, offering flexibility and adaptability.

HYBRID CMS
Solutions where the back-end and front-end systems are functionally separated, while still maintaining a degree of integration; the back-end focuses on traditional CMS capabilities, such as content creation, editing, organization and management, while the front-end enables marketers/developers to focus on personalization and the customer experience; hybrid architectures leverage both traditional and headless capabilities through their structured content delivery and API-based content distribution architectures.

INTRANET
A private network within an organization, typically for internal use, to securely exchange information, collaborate and communicate among employees. An intranet leverages internet technologies to function.

MARKETING AUTOMATION PLATFORM
Software solution that automates marketing tasks and workflows such as lead nurturing, email marketing, customer segmentation and campaign tracking.

M-COMMERCE
Mobile commerce in which the buying and selling of products and services is executed via mobile devices, allowing digital transactions to take place anywhere and at any time.

OMNICHANNEL PERSONALIZATION
Creating a consistent and seamless customer experience across all interaction channels based on individual preferences and behavior.

OPEN-SOURCE CMS
Free-to-use or freemium models, often employed for crafting tailored solutions using extensions and plugins; open-source CMS platforms provide access to their source code for public viewing, modification and distribution, relying on active developer communities for ongoing enhancements.

PRODUCT INFORMATION MANAGEMENT SYSTEMS (PIM)
A centralized system that facilitates organizations to collect, manage and distribute product-related data across various channels to uphold consistency and accuracy in product information.

SOCIAL COMMERCE
Social commerce integrates social media and e-commerce by providing the ability to buy or sell products or services via social platforms.

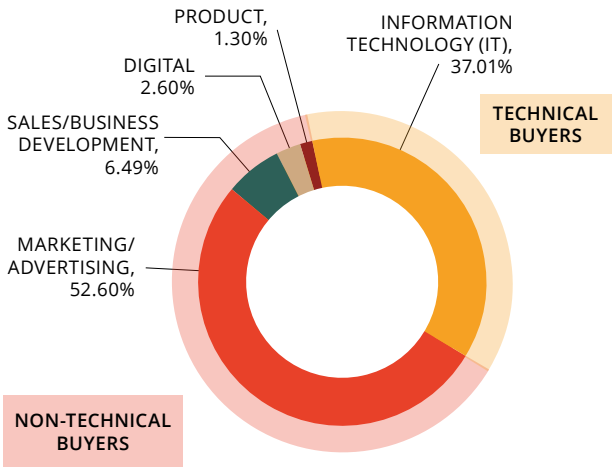
STATIC WEBPAGE
An unchanging webpage that displays the same type of content, regardless of the type of visitor. It does not provide dynamic or interactive elements in its design.

TRADITIONAL CMS
A comprehensive, integrated system designed for collecting, managing, delivering and optimizing content that employs pre-existing themes and templates to create digital experiences across various channels throughout the customer journey.

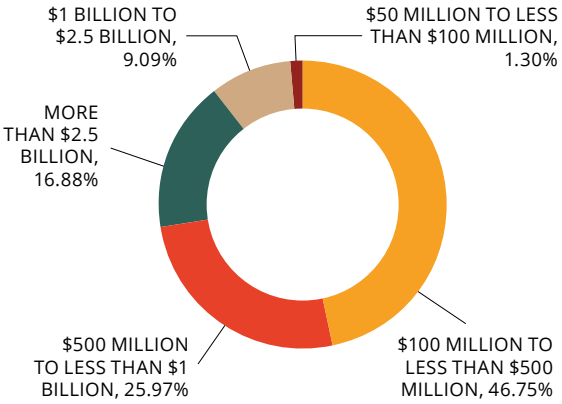
METHODOLOGY

The insights in this report were validated by extensive industry research, including a survey conducted in July 2023 of 154 experienced US-based decision makers and influencers of CMS tools, with both technical and non-technical backgrounds, appertaining to a broad array of industries, business sizes and organizational functions. We are indebted to the diverse set of industry experts who provided their opinions in interviews conducted between June and August 2023.

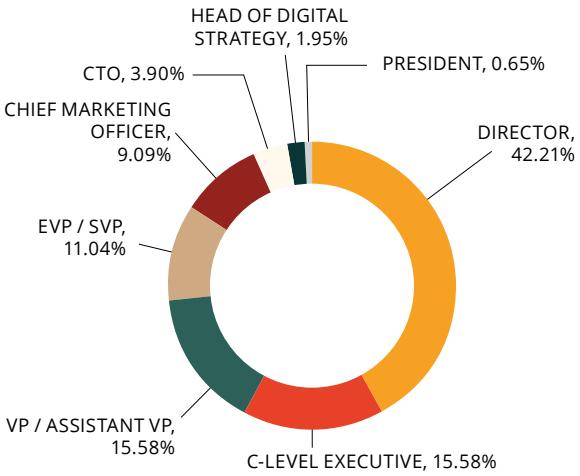
Which of the Following Best Describes Your Department or Current Functional Role Where You Work?



Approximately, What Is the Annual Revenue for the Company for Which You Work?



Which of the Following Best Describes Your Current Role and Business Title?



Which of the Following Best Describes the Industry for Which You Work?



INDUSTRY	% OF RESPONDENTS
TECHNOLOGY AND TELECOMMUNICATIONS	18.83%
RETAIL/CPG	16.88%
MANUFACTURING	14.94%
BANKING/FINANCIAL SERVICE	11.69%
HEALTHCARE/MEDICAL/PHARMACEUTICALS	9.09%
CONSUMER GOODS & SERVICES	5.84%
FOOD/BEVERAGE/RESTAURANTS	3.90%
TRANSPORTATION	3.25%
BUSINESS SERVICES	3.25%
MEDIA & ENTERTAINMENT	2.60%
ENERGY & UTILITIES	2.60%
EDUCATION	1.95%
CONSTRUCTION/CONTRACTING	1.95%
REAL ESTATE	1.30%
HOME IMPROVEMENT/DÉCOR	0.65%
HARDWARE	0.65%
GOVERNMENT	0.65%

ABOUT WINTERBERRY GROUP

Winterberry Group is a strategic consultancy specializing in the intersecting disciplines of advertising, marketing, data, technology and commerce. We collaborate with stakeholders across the advertising and marketing ecosystem—service providers, technology developers, media companies, brands and investor groups—to identify and activate growth opportunities that drive the creation of real and lasting value.

We bring decades of experience and deep industry, operational and M&A expertise that bridges strategic development and tactical execution—driving unprecedented speed-to-action. And through our highly collaborative approach, we enable knowledge transfer and actionability, giving our clients a competitive edge and powering growth in performance, team engagement and shareholder value.

WINTERBERRY GROUP SERVICES

Growth Strategy
Corporate strategy that drives growth is at the heart of what we do. We work with clients to identify core competencies, evaluate strategic alternatives and build comprehensive, actionable growth plans.

Collaborative Activation
We guide brands and marketing practices through business process planning efforts aimed at helping them achieve lasting competitive advantage.

Mergers & Acquisitions
We leverage our industry knowledge to help financial investors make sound, value-driven investment decisions.

Market Intelligence
We maintain an active research and publishing practice that gives our consultants direct access to insights from senior industry executives and complements our client engagements.

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